

PQS QUALIFICATION SHEET

LEADS Production Team Assistant (LPTA) Module

| Name of Trainee | Qualification Start Date | Date Qualified for LPTA |
|------------------------|-------------------------------------|------------------------------------|
| | | |

| PQS Standard | Trainee (Signature) | PQS Qualifier (Signature) | Date |
|------------------------------------|--------------------------------|--------------------------------------|-------------|
| 1. General | | | |
| 2. LPT Phone Watch | | | |
| 3. NALTS/CIRIMS Programs | | | |
| 4. LPT Daily Required Actions | | | |
| 5. LPT Weekly Required Actions | | | |
| 6. LPT Monthly Required Actions | | | |
| 7. Mail List Management | | | |
| 8. Final Qualifications | | | |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
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| 1. General (COMNAVCRUITCOMINST 1140.3) | | | | | | | | | |
| a. Identify the LPT organization and functional responsibilities. | | | | | | | | | |
| b. Identify LPT required personnel billets. | | | | | | | | | |
| c. Explain the difference between Local LEADS and National LEADS. | | | | | | | | | |
| d. Identify and explain your monthly newspaper advertising and direct mail schedule | | | | | | | | | |
| e. Identify and explain your current FY Advertising Plan and postal budget. | | | | | | | | | |
| f. Identify Recruiter LEAD follow-up procedures | | | | | | | | | |
| g. Complete Privacy Act training 101 & 103. | | | | | | | | | |
| 2. LPT Phone Watch (COMNAVCRUITCOMINST 1140.3) | | | | | | | | | |
| a. Explain when a phone watch must be scheduled. | | | | | | | | | |
| b. Explain how many phone lines are required in the LPT. | | | | | | | | | |
| c. Explain and demonstrate the use of a "Three-Party" conference call. | | | | | | | | | |
| d. Explain and demonstrate the ability to use the required LPT Enlisted/Officer Phone Scripts, and discuss which paragraphs must be recited verbatim. | | | | | | | | | |
| e. Explain the coding for the newspaper ads on the phone watch "tick" sheets. | | | | | | | | | |
| f. Explain and demonstrate effective basic objection handling techniques. | | | | | | | | | |
| 3. NALTS/CIRIMS Program (COMNAVCRUITCOMINST 1140.3) | | | | | | | | | |
| a. Explain what the five modules consist of in the NALTS system and the LEADS Reporting Module within CIRIMS main menu. | | | | | | | | | |
| b. Explain the function of each of the five modules. | | | | | | | | | |

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| (1) Entering new LEADS | | | | | | | | | |
| (2) Disposition/Accession | | | | | | | | | |
| (3) Suppression handling | | | | | | | | | |
| (4) Overdue LEADS and New Working LEADS (CIRIMS) | | | | | | | | | |
| (5) Unassigned LEADS (CIRIMS) | | | | | | | | | |
| d. Explain NALTS Address/Territory maintenance under Administrative functions. | | | | | | | | | |
| e. Describe the main parts of the Ad Plan. | | | | | | | | | |
| f. Explain what a DEC is. | | | | | | | | | |
| g. Explain how to activate initiatives and update the Ad Plan in NALTS. | | | | | | | | | |
| h. Explain how tracking daily budget expenditures are accomplished in NALTS (advertising/postage). | | | | | | | | | |
| i. Describe the different NALTS/CIRIMS analytical reports and their function. Demonstrate usage and how they are used for management purposes. | | | | | | | | | |
| j. Identify NALTS/CIRIMS user support and/or problem reporting procedures. | | | | | | | | | |
| 4. LPT Daily Required Actions | | | | | | | | | |
| a. Demonstrate the ability to crosscheck the NAVCRUITDIST daily New Contracts against NALTS records. | | | | | | | | | |
| b. Explain the procedures for forwarding LEADS to NAVCRUITSTAs by Telephone, Fax or Internet. | | | | | | | | | |
| c. Explain the purpose of the LEADS Per District by Transaction State Report and filters. | | | | | | | | | |
| 5. LPT Weekly Required Actions | | | | | | | | | |
| a. Explain how Recruiter feedback/dispositions from OPO are handled. | | | | | | | | | |

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| b. Explain how the Overdue LEADS Report is used and how it is distributed. | | | | | | | | | |
| c. Explain LEAD Production Reports (Summary and Detail) are used and how they are distributed. | | | | | | | | | |
| d. Explain how OPO campus visit tracking forms are used. | | | | | | | | | |
| 6. LPT Monthly Required Actions | | | | | | | | | |
| a. Demonstrate the ability to cross-check the Officer Selects letters against NALTS LEADS Files. | | | | | | | | | |
| b. Demonstrate the ability to analyze the Newspaper Ad Evaluation Report by code, media and newspaper. | | | | | | | | | |
| c. Demonstrate the ability to analyze the Direct Mail Tracking Report by Source Code, Letter Code and Ad Code. | | | | | | | | | |
| d. Demonstrate the ability to analyze the Monthly Status Summary Report and explain how it is used. | | | | | | | | | |
| e. Demonstrate the ability to analyze the Local LEADS Analysis Report and explain how it is used. | | | | | | | | | |
| f. Demonstrate the ability to conduct a monthly LEADS audit per established criteria. | | | | | | | | | |
| g. Explain how the Local and National Contract Analysis Reports are used. | | | | | | | | | |
| 7. Mail List Management | | | | | | | | | |
| a. Explain procedures for completing a mail out. | | | | | | | | | |
| b. Explain Market ID and identify percentage of high school and workforce names held by LPT. | | | | | | | | | |
| c. Demonstrate the ability to download a name list to Web RTools. | | | | | | | | | |
| d. Demonstrate the ability to determine effectiveness of the Direct Mail campaign. | | | | | | | | | |
| e. Demonstrate ability to <u>import</u> name list files to Ad Agency using List Capture procedures in NALTS. | | | | | | | | | |

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| f. Demonstrate the ability to target prospects in NALTS. | | | | | | | | | |
| g. Demonstrate the ability to create a mailing list using List Capture procedures in NALTS. | | | | | | | | | |

8. Record of Qualification:

a. Recommended for PQS Qualification Board. Date: _____

I, _____, certify that _____
Name/Rate/Qualifier Position) (Name/Rate)
is ready for final qualification by a PQS Board for the position of
LEADS Production Team Assistant.

Qualifier's Signature _____

b. Qualification Board: _____ Date: _____

We certify the examinee to be fully qualified for the position of LEADS
Production Team Assistant.

Board President (Name/Rate/Position) (Signature)

Board Member (Name/Rate/Position) (Signature)

Board Member (Name/Rate/Position) (Signature)

Board Member (Name/Rate/Position) (Signature)

Board Member (Name/Rate/Position) (Signature)

c. Reviewed:

PQS Training Officer, NAVCRUITDIST _____
(Signature/Date)

d. Approved:

Commanding Officer, NAVCRUITDIST _____
(Signature/Date)

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e. Service Record Entry (Page 4)

Chief Administrator, NAVCRUITDIST _____
(Signature/Date)

You are hereby granted an extension. Your new maximum qualification date is _____. (Attach a copy of extension request with justification).

PQS Training Officer

Copy to:
Member's Training Record